The Economic Impact of Provincial Heritage Facilities in Alberta

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CULTURE AND MULTICULTURALISM
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PREFACE

As part of the Province of Alberta's comprehensive programme of building a major system of museums, interpretive centres, and historic sites, there was a clear need to identify the economic benefits derived from the taxpayers' investment in this capital development. Through the late 1980's and early 1990's, a system was established of regularly surveying and assessing the economic impact of these heritage facilities created and operated by the government. The results of the surveys have demonstrated a strong economic return on investment, as well as providing invaluable facility/ programme design feedback and marketing information.

While initially intended as a tool for provincial decision makers, the reports from the work have over the years generated great interest and demand not only within Alberta, but both nationally and internationally. Aside from serving senior Alberta Government officials, requests have come from municipal and regional planners, economists, universities, numerous consulting firms, people within the tourism and services industries, and heritage professionals from around the world. Although the socio-educational benefits of such public facilities are broadly recognized, surprisingly little hard economic information exists on the returns of such facilities. Yet particularly in a restrained economy, hard data is essential to place the heritage field in a competitive business position.

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- Aside from instilling local pride and serving as *hands-on* educational centres for Albertans, provincial heritage facilities in Alberta have stimulated cultural tourism and **assisted in diversifying, decentralizing and strengthening the economy**.

- These museums, interpretive centres, and historic sites have provided an excellent return on the taxpayers' investment by **generating new service sector revenues equivalent to their capital costs in periods of three to seven years**.

- For the last four years, an average of 1.3 million visits have been recorded per year at this network of provincial attractions. **The local economic impact of related visitor spending is approximately $20 million annually, with another $6.5 million annually expected when three new facilities open in the near future.** Overall expenditures in Alberta by non-local visitors to these sites average nearly $50 million annually.

- Alberta Culture and Multiculturalism has been conducting extensive surveys of its visitors, resulting in **11,758 completed questionnaires**, to find out who they are, where they come from, what they wish to see, and how much money they spent on their trip. This information is used in facility design, marketing, interpretive programming and economic planning.

A. Rationale

The Government of Alberta has set some international precedents in its perception of and commitment to the development of historical resources as economic generators. Since 1980, over $110 million has been spent on developing fourteen new heritage sites, with three more facilities to open soon. This has occurred in an economic climate which has suffered from a decline in oil and gas industry, and agriculture, the dominant forces in the provincial economy. These facilities have not been concentrated in the major cities, but rather dispersed among the smaller communities within the province, portraying a wide variety of historical themes, each in high-quality and distinctively designed buildings and authentic sites.

Why has such development taken place? Because at the same time that research programmes identifying sites of provincial heritage significance were completed, the provincial government was looking for means to help diversify, decentralize, and strengthen Alberta's economy. Shifting from a research mode to an emphasis on facility development, historical resource managers strengthened their business approach, and began considering cost-benefit analysis of tourism as well as heritage importance. Through visiting museums internationally and studying heritage tourism, lessons were learned about what was expected of world class facilities, how much they cost, what kind of visitation results, and the value of authenticity and in-situ historical resource preservation and interpretation. Rather than ad hoc planning, Alberta's approach examined cost-benefit analysis, insisting on proper scaling of development plans and strict quality control. Furthermore, aside from possessing sites of major heritage value and allure, these host regions required the solid backing of their citizenry whose service economies would benefit. Heritage facility development became a high priority of the public within these regions, and in turn a clear demand of taxpayers of their government. The job of determining community consensus and team building was made easier by the obvious social and educational benefits of these facilities. Host locations were pleased to see their unique heritage being the focus of these developments, instilling further local pride and sense of community. While emphasizing the distinctive identity of Albertans and special character of their environment, these interpretive centres were also nodes where outside visitors could learn about a colourful people and intriguing place. These attractions created jobs in construction, in operation, and most importantly to the service economies that offered food, gas, lodgings, and other supplies demanded in volume by a new tourist population. This too strengthened the social fabric of the host communities, which were often under threat and in flux from the changing circumstances of the other primary industries.

From an educational perspective these facilities offered *hands-on* tactile experiences in Alberta human and natural history and science - lessons long remembered by all those who have directly encountered them. Aside from being located in authentic settings with actual artifacts, interpretation has been thoughtful and audio-visual techniques exciting.

The approach was intended to make history live, sending visitors back in time to experience the past in the most direct way possible. In a school system where heritage awareness has during the last decade been cited as one of its priorities, these interactive sites have meshed with the demands.

Economically, the network of heritage facilities was built to create new patterns of tourism within the province and overall market growth. A few of the larger attractions were actually designed as international tourism destination points, while most others formed part of a critical mass required to influence tourists in their selection planning, or to keep them here longer and spread them further across the province. The traditional and growing popularity of Alberta's Rocky Mountain resorts provided an international tourism base on which to build, as did one of the world's largest rodeos - the Calgary Stampede and the world largest shopping centre - the West Edmonton Mall. In developing the network plan, aside from a consideration of how to best help Albertans appreciate their heritage, a clear strategy was formed on how to keep them in the province as tourists, and how to attract and hold outside tourist-consumers in Alberta.

The critical point in understanding the economics of such attractions is to appreciate that they are predicated on stimulating the regional service economy, not solely through any direct returns in gate charges, giftshop revenues, space rental, etc.. Rather, these facilities are intended to bring in consumers that use the local services, and expand the regional economy and tax base. In reality, approximately 1.3 million visitors annually utilize the network of fifteen provincial heritage attractions, adding tens of millions of dollars into the service economy. Unlike most attractions in the private sector, these museums and historic sites also have extensive research, resource conservation, and public assistance costs that are not predicated on any immediate and direct economic return, but relate more to other mandates of heritage stewardship and education. It is because the Government has a comprehensive revenue net through its provincial tax base that these broadly based institutions can be justified and cost effective.

B. Survey Methodology

The two key factors in selection and design of a survey system for these facilities was simplicity and reliability. A survey was needed that was easy for visitors to understand, that would not annoy them, that could be readily given and compiled, and that could be universally applied to the entire network of attractions. The system also had to be credible to the initial audience - provincial decision markers. A primary concern was not to become overly reliant on complex technical machinations such as interpolation of foreign multipliers, but to make the process, as well as the data, accessible. The obvious approach to determining visitor profile, reactions and expenditure patterns was to simply ask them through a one page questionnaire. To ensure a consistent application of the questionnaire, a proper understanding of the questions asked, and immediate and full return, it was determined the surveys would be handed out at each site by prepared researchers. These individuals were sensitive to the requirements of a fair sample, could assist those surveyed to the extent needed, and could readily compile and take ownership for the survey results. **Over 2,500 of these questionnaires were collected annually, some 11,758 in all over a four year period.**

Actual compilation and analysis occurred at two levels - straight addition and averaging of the questionnaire results for all sites, and use of the Tiebout Local Economic Impact Model where possible at the major attractions. By simply tabulating the questionnaire results, both visitor profile information for all surveyed and expenditures of non-local visitors could be determined. The limitation on the expenditure tracking though was that it gave the spending for the overall trip within the regional and province, rather than specifically relating to the facility visit itself. Yet the computerized Tiebout Model could actually calculate local economic and employment impacts, powerful figures when justifying budgets and arguing for new projects. This Model, named after its American designer and modified by the Canadian Parks Service of Environment Canada, took other local economic indicators provided in large part by the Alberta Bureau of Statistics of Alberta Treasury, meshed them with the survey compilations, and produced highly individualized and reliable results. Each year, with the assistance of the Bureau of Statistics, the survey design and questionnaire in particular were further refined. In most years, special business surveys were also conducted on a limited scale, which attempted to draw additional and more direct connections between the heritage facilities and local service businesses. Attendance figures were gathered from head counts, and starting in 1991 were verified at the major sites with data for ticket sales.

Alberta

CULTURE AND MULTICULTURALISM
Historic Sites and Archives Service

HERITAGE FACILITIES VISITOR SURVEY

This survey has been designed for Alberta Culture & Multiculturalism to assist in evaluating and improving the Historic Sites/Museums for your continued enjoyment. **Individual answers are confidential.**

1. How did you first find out about this Historic Site/Museum? (Please check only one).
   - ❑ Travel guide/event calendar
   - ❑ Advertisement in newspaper/magazine/radio/tv
   - ❑ Articles about the site
   - ❑ Directional sign
   - ❑ Word of mouth (relatives and friends)
   - ❑ Other (please specify:) _____

2. Is this your first visit to the Historic Site/Museum?
   - ❑ Yes
   - ❑ No ... not counting this visit, how many times have you visited this site/museum over the last two years? ____

3. How much time did you spend at the museum?
   - ❑ less than 1 1/2 hrs. ❑ 1 1/2 to 3 hrs. ❑ over 3 hrs.

4. Do you or any member of your household/group (household includes any persons living with you), have any personal disabilities that make the exhibits and displays difficult to use?
   - ❑ Yes ❑ No

   If yes, please indicate what changes you would like to see.
   _____
   _____

5. In what other language, if any, would you like to have information about the site? _____

6. What did you like best about the Historic Site/Museum?
   _____
   _____

   What did you like the least?
   _____
   _____

7. In addition to government funding, do you feel the Historic Site/Museum should be supported by (please check only one):
   - ❑ Donations ❑ Admission charge

8. Would you visit the Historic Site/Museum again?
   - ❑ Yes ❑ No ❑ Undecided

9. Counting yourself, how many members of your household/group are visiting the Historic Site/Museum with you?____ ____

10. Counting yourself, **how many** of the above persons are in each age group?
    - ___ Less than 12 yrs. ___ 20-34 yrs. ___ 50-64 yrs.
    - ___ 12-19 yrs. ___ 35-49 yrs. ___ 65 & over

11. Which level of education best describes each member of your household/group? (Please indicate **how many** are in each category.)
    - ___ Grade 8 or less ___ Technical school
    - ___ Grade 9-13 ___ University/College

12. Where do you live?
    - ❑ Alberta (please state City/Town/Village) _____
    - ❑ Other Province (please specify) _____
    - ❑ Other Country (please specify) _____

Please complete the remainder of this questionnaire **if you live more than 100 km./60 miles from the Historic Site/Museum.** The following questions will assist us in evaluating the economic impact of this Historic Site/Museum on the local area.

13. What is the reason for your trip to this region (170 km./100 miles)?
    - ❑ To visit this Historic Site/Museum
    - ❑ Vacation
    - ❑ Family affair (wedding/reunion/etc.)
    - ❑ Meeting/convention/trade conference/other business
    - ❑ Other (please specify) _____

14. How many days are you planning to stay in the region?
    - ❑ less than 1 day ❑ 2 nights
    - ❑ overnight ❑ ____ nights

15. Please indicate the type of accomodation you have been using in the region:
    - ❑ Hotel ❑ Motel ❑ Camping ❑ Other

16. Please estimate the **expenses** (in Canadian dollars) that you and members of your household/group **incurred in the region.** Please include credit card purchases. (For bus tours, include only expenses by yourself or members of your household traveling with you.)

Meals and refreshments bought in restaurants and hotels	$_____Cdn
Lodging	$_____Cdn
Automobile gas, oil, maintenance, and repair	$_____Cdn
Automobile rental (if applicable)	$_____Cdn
Non-Auto rental (if applicable)	$_____Cdn
Bus tour cost per day (if applicable)	$_____Cdn
Groceries and beverages bought in stores	$_____Cdn
Goods and services bought in stores	$_____Cdn
Recreation and entertainment	$_____Cdn
All other goods and service	$_____Cdn

17. Please estimate the dollar amount spent:

In the local area of the Museum/Historic Site (34 km./20 miles)	$_____Cdn
In the region but not locally(170 km./100 miles)	$_____Cdn

We appreciate your taking the time to fill out this questionnaire. **Individual answers are confidential.** The information will be used to help in future programme and facility planning. Please return the questionnaire when you are done

A. How Many People Visit These Attractions?

Over the last four years, an average of 1.3 million visitors have come to the Alberta network of provincial heritage attractions each year. After ten fold growth in visitation through the 1980's, only 1991 showed a substantial decline. At the same time the levelling off in the last few years and the decline in 1991 was a trend felt elsewhere across the country as recessionary times deepened. The introduction of an admission charge at major attractions and reductions in promotional budgets are also believed to have affected the 1991 attendance figures. With the public opening of the Fort-George Buckingham House Provincial Historic Site in the spring of 1992, the Reynolds-Alberta Museum in the fall of 1992 and the Remington-Alberta Carriage Centre in the spring of 1993, annual attendance is expected to grow by 10,000, 250,000 and 150,000 respectively.

FACILITY ATTENDANCE SUMMARY (000's)

Site	1984	1985	1986	1987	1988	1989	1990	1991
Brooks Aqueduct						5.5	5.4	5.0
Cochrane Ranche	17.8	15.5	23.4	22.0	29.9	29.6	28.8	23.3
Father Lacombe Chapel	5.1	5.5	4.7	4.8	4.1	4.7	5.0	6.9
Ft. McMurray Oil Sands Centre		19.8	42.2	59.4	68.6	66.9	52.2	53.4
Frank Slide Centre		67.8	93.6	107.9	108.0	90.3	84.6	65.0
Head-Smashed-In Centre	9.9	16.2	22.0	114.8	131.3	135.7	133.7	131.3
Historic Dunvegan	10.8	9.5	12.2	11.3	18.9	21.2	17.7	15.7
Leitch Collieries	14.5	16.2	20.0	20.6	15.9	20.9	18.6	13.4
Provincial Museum of Alberta				339.0	306.9	318.6	441.9	254.3
Remington-Alberta Carriage Centre					9.7	9.7	19.7	38.3
Reynolds-Alberta Museum					46.9	29.7	38.0	33.1
Tyrrell Field Station				41.5	54.8	45.8	46.0	38.3
Royal Tyrrell Museum		82.2	560.2	479.3	490.9	495.6	451.3	330.9
Rutherford House	11.9	20.8	21.2	22.0	19.9	26.2	26.0	23.4
Stephansson House	7.4	9.6	12.0	10.0	9.4	10.0	9.8	12.2
Strathcona Arch. Centre	9.4	10.7	11.5	10.1	9.8	8.1	8.1	-
Ukrainian Cultural Village	42.8	37.4	71.7	60.1	74.5	69.5	66.1	61.8
Victoria Settlement	4.0	2.9	3.7	4.2	12.5	3.9	3.7	5.5
TOTALS	**133.7**	**314.2**	**899.0**	**1,307**	**1,412**	**1,392**	**1,453**	**1,111**

MONTHLY ATTENDANCE DISTRIBUTION FOR THE NETWORK

Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
3%	2%	4%	5%	8%	12%	24%	21%	8%	6%	4%	3%

One of the greatest challenges facing facility managers and related service sector operators is the high degree of seasonality to this visitation, with approximately 57% occurring in the three summer months. This concentration can create facility overloads during peaks, while also leaving the service sector underutilized for much of the year.

Another challenge is to keep these attractions exciting for visitors by updating displays, bringing in traveling exhibitions, and by staging special events. It is clear by their profiles and comments that the audience is highly sophisticated and increasingly demanding. To keep the attendance patterns in context, the 1990 Canada Year Book of Statistics Canada makes an interesting point:

"Statistics have demonstrated that destinations exhibiting cultural or historical attractions have maintained or increased their popularity at the expense of traditional destinations - those that rely on purely geographic characteristics such as climate, water, topography, to attract visitors. Tourists are becoming more discerning about value for money spent and are putting more emphasis on the tourism culture connection."

B. Who Are These Visitors?

According to some 11,758 questionnaires collected by Alberta Culture and Multiculturalism cumulatively over the last four years, the typical profile for visitors to these provincial heritage attractions is as follows:

- The **average party size** is approximately **three people**.
- The **average age** is slightly over **thirty-five**, although there is a good spread of age groups.
- **Students** comprise approximately **one-third of the total** audience.
- **Over one-third** of the visitors had **university or college** educations (35%).
- The vast majority of visitors spoke English, although some expressed an interest in seeing interpretation in other languages (11%), particularly French (6%).
- Over half of those surveyed said they were **on vacation (53%)**, many were **visiting family (18%)**, a small number were **on business** or attending conferences in the area **(5%)**, some were simply making a **brief visit** to the museum/historic site **(15%)**, and a portion there for **other reasons (9%)**.
- They **stayed** at the facility **for 1.5 hours** on average.
- The associated **tourists stayed in the area 1.5 days** on average.
- During the four years, most claimed they were first time visitors (72%).
- Most became aware of the site by word of mouth (45%), although some were attracted by roadside signage (18%) or travel guides (14%).

A fairly high level of consistency could be seen from year to year in the surveys, yet some variance did occur from site to site, as will be shown in the facility profiles later in the report.

These figures are somewhat comparable to the 1990 Domestic Travel Survey of Statistics Canada which shows the average Canadian travelling in Alberta as a 38.9 year old, who came 320 km. one-way to get there, with a party of 2.3 people, that spent 1.7 days in the area.

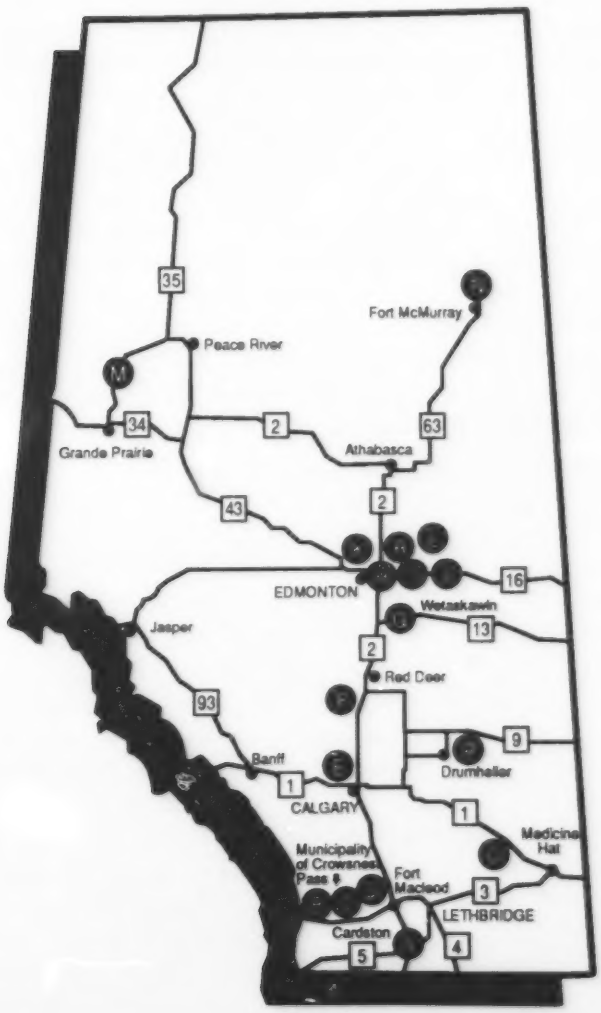
C. Where Do These Visitors Come From?

The origins of visitors varied greatly, but the overall breakdown is as follows:

- **Albertans** comprised over half of the total visitation **(59%)**, with more non-local (34%) than local (25%). Local visitors are defined as living within 100 kilometres or 60 miles of the historic site or museum.

- **Canadians from other provinces** made up nearly one-quarter the visitation **(22%)**. The largest portion of these was from British Columbia (8%), followed by Ontario (5%), Saskatchewan (5%), and the other provinces (4%).

- **Foreign visitors** made up the rest **(19%)**. The majority of these were visitors from the United States (12%), yet there was also a variety of offshore visitors (7%) particularly from Europe (4%), Australia and Asia.



- A Remington-Alberta Carriage Centre
- B Frank Slide Interpretive Centre
- C Leitch Collieries
- D Head-Smashed-In Buffalo Jump Interpretive Centre
- E Cochrane Ranche
- F Stephansson House
- G Reynolds-Alberta Museum
- H Rutherford House
- I Provincial Museum of Alberta
- J Ukrainian Cultural Heritage Village
- K Father Lacombe Chapel
- L Victoria Settlement
- M Historic Dunvegan
- N Ft. McMurray Oil Sands Interpretive Centre
- O Brooks Aqueduct
- P Royal Tyrrell Museum

D. What Are the Visitors' Reactions to the Attractions?

While slightly more subjective and harder to compile, the overwhelming reactions of visitors to these attractions were very positive.

- Attendance is still high despite an economy in recession.

- The vast majority of **visitors said they would return** to the attractions again **(80%).**

- When asked **what things they liked most about the site**, nearly half the visitors chose to make a narrative response, with answers that **seemed equally divided between scenery, building, exhibits, authenticity, and staff**.

- When asked what they most disliked, only one-tenth those surveyed chose to respond with a narrative answer, where they indicated some problems with signage, stairs, walking distances, inadequate lighting, and concerns about cafeteria or gift shops were most often identified.

- A small portion of the visitation claimed that they had a personal disability that made the exhibits and displays difficult to use (5%), primarily relating to access problems.

- During 1988 and 1989, more than three quarters of the visitors rated the voluntary donations system for admissions as either good or very good. When admission charges at the major sites were introduced in 1990, the question was changed to ask that in addition to government funding, how should these facilities be supported. In 1990, the responses were greatly in favour of donations over fees (89% to 11%). In 1991, there was more acceptance of the fees, yet most visitors still preferred donations (63% to 37%).

E. How Much Money are Visitors Spending?

Of all the kinds of information sought, determining visitor expenditures was the most sensitive and complex. Some of those surveyed would give no direct answer on their spending, yet would indicate where they stayed and for how long providing some useful background. However, many of the key non-resident visitors were quite specific about their spending, offering some valuable insights. Other retail and trade statistics and other surveys also provided some interesting verifications.

Expenditure patterns broke sharply between three categories of visitors. **Overnight visitors using campgrounds spent on average $21.81 per person per day**, according to the 1990 survey which was fairly representative and acts as a good median. **Campers represented approximately 23% of all site visitors** for that year. **Overnight visitors using hotels or motels spent on average $51.97 per person per day and represented some 25% of all visitors. Non-local Day Users spent some $18.77 per person per day**, either passing through or staying with relatives (30% jointly).

These kinds of figures can be compared to the 1990 Domestic Travel Survey of Statistics Canada, which indicates that **Canadians travelling within Alberta** spend on average **$59.41 per person per day** and their 1989 International Travel Survey showing that **foreign visitors had average same day expenditures of $17.00 per day, and average overnight visitor expenditures of $61.50**. Those expenditures for Canadians travelling in Alberta consisted of transportation (20%), accommodation (26%), food and beverage (29%), recreation and entertainment 9% and other spending (16%). It is also interesting to note that Japanese visitors to Alberta were seen to spend $513.00 per visit or $143.00 per night (based on a small sample), while American visitors to Alberta were seen to spend $17.20 for day use or $67.00 per night per person.

Two methods were used to determine total economic impacts of this heritage tourism: one employing a very specific local economic impact figure, and the other a more generalized regional/provincial impact. The Tiebout Local Economic Impact Model produces a highly tailored impact using a wide field of variables in a computer application. It provides a reliable idea of the actual impact of the attraction itself on the local economy. **Using the Tiebout Model, the local economic impact of Alberta's provincial heritage facilities is approximately $20 million annually. This will increase by as much as an additional $6.5 million annually with the opening of three new provincial facilities within the next two years.**

Another means to ascertain the economic impacts associated with these museums, interpretive centres, and historic sites is to calculate directly from the questionnaire responses, using the following fields:

Total Attendance x
% Non-Local x
% User Type x
User Type Expenditure x
Duration =
Overall Regional/Provincial Expenditures

What this produces is a regional/provincial impact of tourism, where non-local visitors are providing their expenditures on their overall Alberta trip. The limitation is that these figures are only partially attributable to the heritage facilities themselves.

Extrapolating from the number of visitors in total to the network of attractions for the year (1,452,869), and the average duration of their stay (1.5 days), visitors to these attractions in the 1990 peak year would have spent approximately the following:

Campers	$11 million
Hotel/Motel Users	$33 million
Day Users	$10 million
	$54 million*

*Non-Local Visitor Expenditures in Region/Province

The average regional/provincial expenditures by non-local visitors over the four year period was $48 million per year. Aside from leaving out several million dollars more in local visitor expenditures, these figures do not include the impact of the operating budgets for the sites, construction impacts, and other indirect impacts which will be explored to some extent later in the report.

For the purposes of this report, only the six provincial heritage facilities with the highest numbers of visitors will be specifically profiled. Yet collectively, they account for more than 85% of the network's visitation, and an even larger portion of the economic impact. A significant observation that can be made on the summaries is a comparison of the annual local economic impact against the initial capital costs of these facilities. **For the most part, these sites have generated revenues for their local and regional service economies in amounts equal to the taxpayers' investment in building them in periods of three to seven years. What this means is that most of these facilities have already produced more economic spinoffs than their cost and have in effect *already more than paid for themselves.***

What is missed in the summaries, however, is any consideration of the extensive system of heritage facilities operated by other parties such as the over 135 other community run museums, two major civic historic parks, approximately six local historic sites, thirty-eight archives, and one national historic park. It is a primary goal of the provincial attractions to bring additional visitors into these other regional and local heritage facilities. **In total, Alberta's complete heritage network receives more than 5 million visits annually.**

Royal Tyrrell Museum

Location: 6 km. NW of Drumheller on N. Dinosaur Trail in Midland Provincial Park
Average Annual Visitation: 442,000
Opening Date: September 1985
Original Capital Cost: $29.5 million
Landbase: Provincial Park
Main Facility Size: 11,000 m^2 / 146,000 ft^2

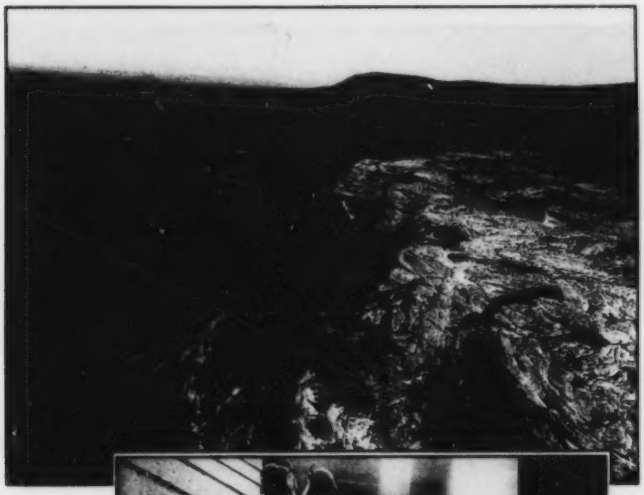
Mandate: The Royal Tyrrell Museum is one of the largest facilities of its kind internationally, exploring the history of life on earth. It is perhaps best known for having the largest number of dinosaur specimens on display in the world. Aside from the display hall, this facility is a major research institution advancing the field of palaeontology, dinosaurian studies, and acting as a steward for its massive collections of fossil specimens.

Attendance Characteristics: This world class facility located in Alberta's badlands and dinosaur bonebeds is a major destination point for both Canadian and international visitors. Aside from being the best attended heritage attraction in the provincial system, it averages a high percentage of foreign visitors (25%), the highest percentage of non-local Albertans (49%), the largest party size (3.5 people), and had visitors who stayed amongst the longest periods at the facility (2.4 hrs.). Each year, guest registers have shown visitors from all Canadian provinces, usually over forty states, and approximately 40 other countries.

Economic Impact: Using the Tiebout Local Economic Impact Model, it was determined that **the economic impact of this facility in the local economy ranged between $7 million and $10 million annually, averaging $8.3 million annually**, the most of any provincial heritage attraction in the province. Slightly over 180 jobs were generated by this facility, primarily in the regional service sector. A supplemental survey of 33 local service businesses in 1990 showed that 42% of their trade was to the related tourism. Leakage to Calgary's service sector appears significant. Using the generalized regional/provincial impact calculations, non-local visitors who came to the museum amongst other places, spent approximately $18 million on their Alberta trips.

Head-Smashed-In Buffalo Jump Interpretive Centre

Location: 18 km. W of Hwy. #2
on Secondary Highway #785
near Fort Macleod
Average Annual Visitation: 133,000
Opening Date: July 1987
Original Capital Cost: $9.3 million
Landbase: 882 ha. / 2,180 ac.
Main Facility Size: 2,300 m^2 / 25,000 ft^2



Mandate: The Head-Smashed-In Buffalo Jump is one of the oldest, largest, and best preserved buffalo jumps in North America, which explains its 1981 U.N.E.S.C.O. designation as a World Heritage Site. This site centred on a high cliff face of the Porcupine Hills some thirty miles west of the last range of the Canadian Rocky Mountains, and it was used by Natives for nearly 6,000 years to stampede buffalo to their death. Through its Native interpreters, walking trails, and a seven tiered interpretive centre buried in the hillside adjacent to the jump, the rich cultural history of the Plains Indian is explained.

Attendance Characteristics: This dramatic, internationally-recognized site has many of the same visitor characteristics of the Royal Tyrrell Museum as a destination attraction. This site had the highest percentage of foreign visitors (30%) and a large percentage of non-local Albertans (46%). The average visit duration is longer than at most sites (2.2 hrs.).

Economic Impact: Using the Tiebout Local Economic Impact Model, it was determined that **the economic impact of this facility ranged between $2 million and $4 million annually, averaging $3 million**, and produces some 55 jobs, primarily in the area's service sector. Using the regional/provincial impact method produces an impact figure as high as $7.9 million in spending by non-local visitors on their overall Alberta trips. A supplemental survey of 25 local service businesses in 1990 showed that 43% of sales were attributed to related tourism. This same survey showed businessmen concerned about the high level of seasonality involved with tourism to the site, with nearly 70% of visitors coming in the three summer months.

Frank Slide Interpretive Centre

Location: 1 km. off Hwy. #3, Municipality of the Crowsnest Pass
Average Annual Visitation: 87,000
Opening Date: April 1985
Original Capital Cost: $6.5 million
Landbase: 104 ha. / 257 ac.
Main Facility Size: 1,200 m^2 / 13,000 ft^2

Mandate: The Frank Slide Interpretive Centre focuses on the rich history of the Crowsnest Pass, Alberta's most southerly gap through the Canadian Rocky Mountains, an area known for early coal mining, railroading, and forestry. The Centre particularly concentrates on coal mining history, and the remarkable 1903 Frank Slide where a portion of a mountain fell and covered a town. The Centre overlooks both the slide and the pass, features numerous exhibits, contains an award winning video presentation, and has a network of associated walking trails.

Attendance Characteristics: The visitor profile for this regional interpretive centre matches the overall system averages in most categories. However, there were slightly fewer Albertans (52%), less family visits in the area (9%), more vacationers (72%), and less time spent at both the attraction (less than 1.5 hrs.) and in the region (.5 days). It is also interesting to note that a relatively high portion of its visitors become aware of the site through directional signage (28%). **The statistics strongly reflect the area's current role as a travel corridor, rather than an end destination area.**

Economic Impact: Using the Tiebout Local Economic Impact Model, it was determined that **the economic impact of this facility ranged between $850,000 and $1.6 million annually, averaging $1.1 million**, primarily in the area's service sector. Using the regional/provincial impact method, non-local visitors spent an average of $2.1 million annually on their overall Alberta trips.

Fort McMurray Oil Sands Interpretive Centre

Location: Corner of Hwy.# 63 and MacKenzie Blvd., in Fort McMurray
Average Annual Visitation: 60,000
Opening Date: September 1985
Original Capital Cost: $9.2 million
Landbase: 6.5 ha. / 16 ac.
Main Facility Size: 2,500 m^2 / 27,000 ft^2

Mandate: The Fort McMurray Oil Sands Interpretive Centre presents the rich history and modern technology associated with oil sands exploration, mining, separation, and processing. The dynamic building, interactive displays, experiment areas, theatre, and outdoor artifact garden, all contribute to a better overall understanding and appreciation for the physical region, oil sands history, and the related business and science. This attraction serves not only local visitors and tourists, but also business travellers who use the Centre as an orientation point for their work in the area.

Attendance Characteristics: The visitor profile for this regional interpretive centre matches the overall system averages in most categories. However, there were slightly more Canadians from other provinces (29%), less foreign visitors (9%), many more family visitors (38%), less vacationers (33%), and less time spent at the attraction (less than 1.5 hrs.), more time spent in the region (slightly over 2 days). It is also interesting to note that a relatively high portion of its visitors become aware of the site through word of mouth (56%). **The statistics strongly reflect a service role to the large workforce of this relatively isolated area, with many employees and visitors from other parts of Canada.**

Economic Impact: Using the Tiebout Local Economic Impact Model, it was determined that **the economic impact of this facility ranged between $720,000 and $1.4 million annually, averaging $940,000**, and produces over 19 jobs, primarily in the region's service sector. It is also felt that this centre has assisted in promoting sales of oil sands technology to visiting businessmen. The regional/ provincial impact of these visitors was approximately $1.6 million annually in their spending on the overall Alberta trips.

Ukrainian Cultural Heritage Village

Location: On Hwy. # 16, 50 km. E of Edmonton
Average Annual Visitation: 68,000
Opening Date: 1971 & 1975
Capital Cost: $16.2 million
Landbase: 105 ha. / 259 ac.
Facilities: 30+ period buildings and modern interpretive centre

Mandate: The Ukrainian Cultural Heritage Village tells the story of Ukrainian settlement in East Central Alberta from 1892 to the 1930's. Costumed interpreters present a living history to visitors through re-enactment, role playing, and direct participation. Active farmsteads, period agricultural demonstrations, a rural townsite with a variety of enterprises, and regularly scheduled special events provide a backdrop for an enriching experience in the past.

Attendance Characteristics: The visitor profile for this heritage village matches the overall system averages in most categories. However, duration of stays both at the site (2.3 hrs.) and within the region (1.9 days) were slightly longer than average. Perhaps most distinctive was the large portion of the visitation from local residents (35.5), yet this is not surprising considering the city of Edmonton's relatively close proximity. Visitors coming to this site in association with a family visit were more than twice the network average (40%), and the portion of visitors from Saskatchewan was the highest of the network (9%), perhaps because of the Yellowhead Highway location and large Ukrainian populations there as well.

Economic Impact: While this site could not employ the Tiebout Local Economic Impact Model, experience from other sites would suggest the local economic impact of this site ranges from $1 million to $2 million annually. The regional/provincial impact method showed that non-resident Day Users to the site spent an average of $36.50 per person, hotel/motel users $63.36 per person per day, and campers $21.46. This is amongst the highest Day User expenditure in the network. Calculating from the 65% non-resident visitation in that year, types of accommodation they used (Hotel/Motel-37%, Campers-26%, Other-37%), and their average stay (1.9 days), the generalized impact of non-local visitors to this attraction is as high as $3.5 million annually in their overall Alberta trip expenditures.

Provincial Museum of Alberta

Location: 12845 - 102 Avenue, Edmonton
Average Annual Visitation: 305,000
Opening Date: December 1967
Original Capital Cost: $9.2 million (1967)
Landbase: 5.4 ha. / 13.5 ac.
Facility Size: 2,300 m^2 / 232,000 ft^2

Mandate: The Provincial Museum of Alberta is a showcase for the province's human and natural history, a research institution curating that heritage, and a primary steward preserving the artifacts and specimens illustrating that past.

The facility acts as an orientation centre to the province for many non-residents, and as a learning centre for Albertans to know more about their colourful common heritage and unique environment. The Museum combines permanent galleries, temporary exhibits, and special events to achieve it interpretive objectives, and a rigorous combination of field and laboratory work for its research initiatives. Specialized equipment and staff also deal with extensive artifact/ specimen conservation programmes.

Attendance Characteristics: The most distinctive aspects of this facility is the large portion of local users within its visitation (46%) and return visitors (56%). Yet unlike the other sites, this museum is located in a major city and has been in existence far longer than the others. **This educational facility also serves more children under 12 than other sites (26%), primarily through its extensive school programmes.** Few non-local visitors came explicitly to see the museum (6%), but rather it was part of a larger Edmonton package.

Economic Impact: While this large urban attraction is unable to use the Tiebout Local Economic Impact Model, from the experience at other sites a reasonable estimate would place the annual local economic impact of this facility at **$2 million to $5 million.** Using the regional provincial calculations, non-local visitors to the Provincial Museum of Alberta spent as much as $15.6 million at a 1990 peak, to an average of $11.5 million annually during their overall Alberta trips.

Other Provincial Heritage Facilities

SITES UNDER DEVELOPMENT

Name	Capital Cost	Size	Opening Date	Annual Attendance
Reynolds-Alberta Museum, Wetaskiwin	$22.5 million	94,000 ft² 156 acres	1992 (Fall)	250,000 Projected
Remington-Alberta Carriage Centre, Cardston	$9.0 m	65,000 ft² 15 acres	1993 (Spring)	150,000 Projected
Fort George/Buckingham House, c. Elk Point	$1.4 m	4,300 ft² 524 acres	1992 (Spring)	10,000 Projected

SMALLER SCALE ATTRACTIONS

Name	Capital Cost	Size	Opening Date	Annual Attendance
Tyrrell Field Station c. Brooks Dinosaur Park	$2.2 million	9,000 ft²	1985 (Sept.)	46,000
Leitch Collieries Crowsnest	$1.4 m	NA 14 acres	1983 (Sept.)	17,000
Victoria Settlement c. Smoky Lake	$0.3 m	NA 14 acres	1981 (Aug.)	4,000
Stephansson House c. Markerville	$0.3 m	NA 215 acres	1982 (Aug.)	10,000
Rutherford House Edmonton	$0.4 m	NA 1 acre-leased	1973	24,000
Dunvegan c. Fairview	$3.3 m	NA 56 acres	1961	18,000
Cochrane Ranche Cochrane	$0.5 m	NA 151 acres	1979	28,000
Father Lacombe Chapel St. Albert	$0.1	NA 1 acre-leased	1929 & 1983	5,000
Brooks Aqueduct c. Brooks	$0.3	NA 47 acres	1989 (Aug.)	5,000

Other sites not included within the survey are the Provincial Archives, the Okotoks Erratic Kiosk, and the Strathcona Archaeological Centre/Alberta Natural Resource Science Centre complex (the later two of which were closed).

Economic Impact: According to their feasibility studies, the Reynolds-Alberta Museum and Remington-Alberta Carriage Centre will have annual economic impacts of $4.5 million and $2 million respectively. The remaining sites with an attendance of approximately 157,000 annually has a highly variable composition, but collectively generate approximately $1 million to $2 million annually to their local economies extrapolating from the Tiebout Model, or a regional/provincial impact of approximately $3.3 million annually in non-local visitor expenditures on their overall Alberta trips.

Alberta's provincial heritage facilities have changed tourism patterns in the province, bringing new visitors into areas without strong traditional tourism industries. Associated visitor spending now provides tens of millions of dollars annually to the local economies of host communities, as well as contributing to overall provincial revenues. The return on investment for taxpayers has been very good, with economic benefits that are broadly based and long term. Furthermore, this activity has been predicated on some of the keys strengths of many of these regions, a dramatic landscape and colourful history.

While the number of visitors to these heritage attractions have increased rapidly over the last decade, considerable room for growth still exists. From an economic perspective, an important challenge is to attract more American visitors into the province, and to provide easier access and more opportunities for off shore visitors initially here for our mountain resorts to stay and visit the rest of the province. The Americans comprise a massive market on Alberta's doorstep, most of whom still are not fully aware and appreciative of our unique mix of cultural and scenic diversity. Similarly, while the huge increase in Japanese tourism in Alberta in recent years and the high daily expenditures of this group are impressive, their numbers are still relatively small.

Although the recent levelling off and 1991 decline in visitation to these heritage attractions is reflected in international trends, it should also serve as a warning against complacency in one of the largest but most competitive industries - tourism. While many of the immediate difficulties for the industry may be beyond our control, **the network of Alberta's heritage facilities will have to continually renew their displays, programmes, and marketing to remain attractive and build market share of increasing discriminating international tourists.**

Finally, it is critical that these museums, interpretive centres, and historic sites not be viewed simply as entertainment, but rather as places that instill a better understanding of Alberta's unique environment and people. For our foreign guests, aside from the tourism aspects, this heightened awareness can lead to better cultural, diplomatic, and business cooperation. For Albertans, these tangible links to their heritage build pride, well-being, and an enhanced sense of community and province.